



Team Based Care

Planned Care

Using data and the team to organize visits in order to address care gaps and provide all the services needed for the highest quality of care.

Key Changes

- **Assign** delivery of key services to specific staff positions and ensure they are trained.
- **Use** protocols and standing orders to allow staff to act independently.
- Efficiently **generate** patient-specific data on services that are due.
- **Huddle** with the core team and review patient information before clinic session.
- **Plan** and **ensure** care plan follow up.

Examples

- Review delivery system design, decision support, IT systems and patient engagement strategies for opportunities of improvement.
- Develop strategy for sharing the care plan with patient and family at appropriate intervals. Include patient in the design process.
- Flow map current in-clinic process for populations of focus.
- Look for opportunities in flow map to improve process through PDSAs.
- Evaluate who is doing the work now and who could do the work.
- Develop and test template for workflows which define expectations.
- Design and test workflow for gathering important patient clinical information for the huddle.
- Develop and test workflow for staff to run the daily huddle.
- Design and test workflow for assuring patients have indicated work up before visit.
- Use missed opportunities to learn how to improve in-clinic process design as a team.
- PDSA the process for sharing care plan with patient.

Search [ImprovingPrimaryCare.org](https://www.improvingprimarycare.org) for more resources

Primary Care Team Guide Assessment-Related Questions

8	Standing orders that can be acted on by non-independent providers under protocol...	do not exist for the practice 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	have been developed for some conditions but are not regularly used. 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	have been developed for some conditions and are regularly used. 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>	have been developed for many conditions and are used extensively. 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/>
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Planned Care

	Components	Level D	Level C	Level B	Level A
16	Visits...	largely focus on acute problems of patient. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	are organized around acute problems but with attention to ongoing illness and prevention needs if time permits. 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	are organized around acute problems but with attention to ongoing illness and prevention needs if time permits. The practice also uses subpopulation reports to proactively call groups of patients in for planned care visits. 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>	are organized to address both acute and planned care needs. Tailored guideline-based information is used in team huddles to ensure all outstanding patient needs are met at each encounter. 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/>
17	A patient who comes in for an appointment and is overdue for preventive care (e.g., cancer screenings)...	will only get that care if they request it or their provider notices it. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	might be identified as being overdue for needed care through a health maintenance screen or system of alerts, but these tools are inconsistently used. 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	will be identified as being overdue for care through a health maintenance screen or system of alerts that is used consistently, but clinical assistants may not act on these overdue care items without patient-specific orders from the provider. 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>	will be identified as being overdue for care through a health maintenance screen or system of alerts that is used consistently, and clinical assistants may act on these overdue care items (e.g., administer immunizations or distribute colorectal cancer screening kits) based on standing orders. 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/>

How Primary Care Teams Achieve the Quadruple Aim

